

PAYROLL INTEGRATIONS



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401(k) Record Keeping

THE PROBLEM WITH 401(k) ADMINISTRATION

Tracking and updating deferral changes in payroll

Processing employee loans

Enrolling employees on time

Timely, accurate contribution submission



Providing year-end census

Companies spend 45 to 100 hours per year on payroll related plan administration*

**data gathered from leading payroll companies*

401(k) Record Keeping

THE PROBLEM WITH 401(k) ADMINISTRATION

Three ways to address these challenges

Manual processing

- Requires manual work
- Keying data into record keeper
- Updating payroll with changes



180 integration

- Data flows one-way
- Contributions process via automatic upload
- Changes made manually in payroll



360 integration

- Data flows two-ways
- Automatically processes contributions
- Automatically updates payroll for changes



Companies are looking for solutions to eliminate the time-consuming tasks

SFTP vs API integration – what's the difference?

SFTP COST

Manual process to build files
Setup can be thousands
High recurring per payroll fees

SFTP GO LIVE

Project can take 6-8 months
Extensive testing required
Large human capital expenditure



API COST

Low to no setup costs
Only Payroll Integrations monthly fees apply

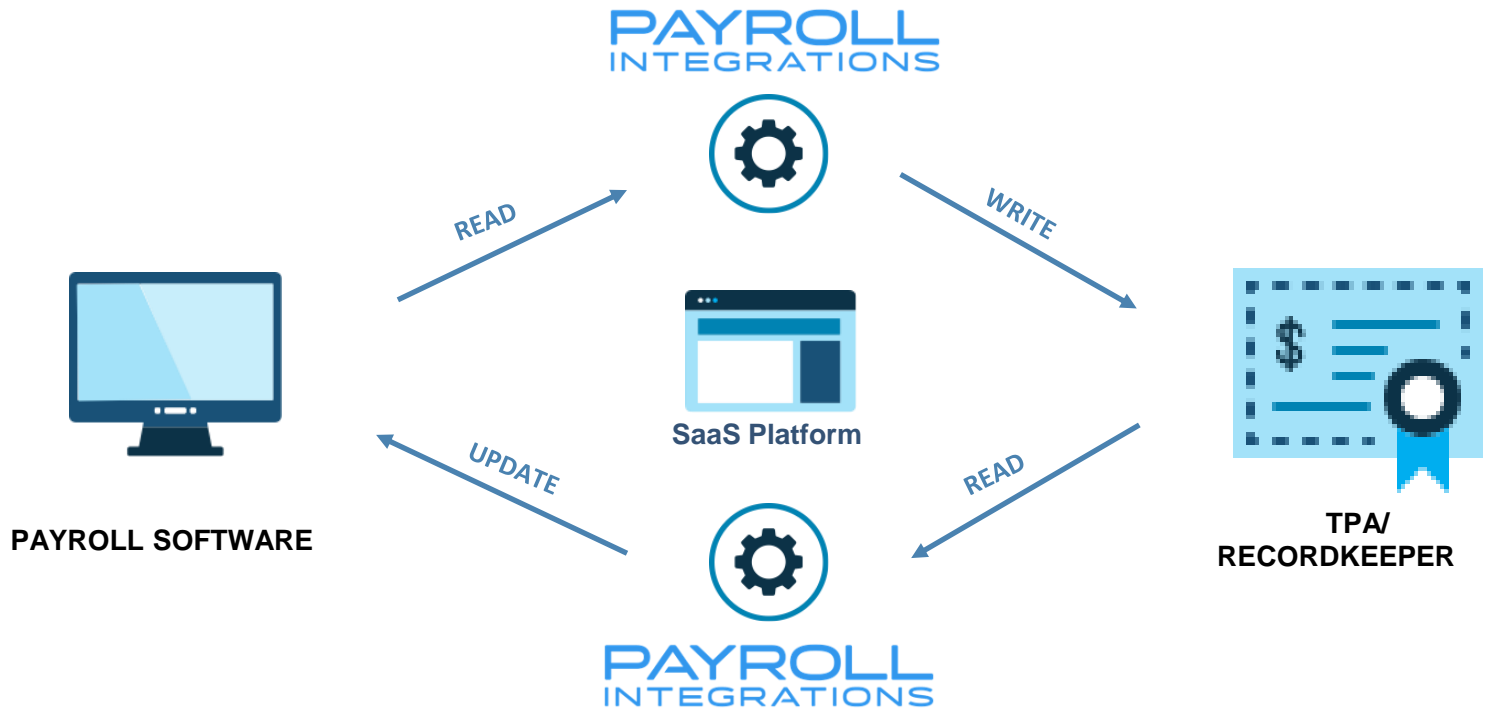
API GO LIVE

Go live in 4 to 8 weeks
Minimal to no testing required
Little human intervention to setup
Can process historical payrolls

*Payroll Integrations builds 360 API Integrations with payroll companies
versus the traditional SFTP based file transfer*

Product

HOW IT WORKS



Data Available to Administrator

HOW IT WORKS

Plan administrators have access to full year census data for testing and tax filing



CENSUS DATA

SSN, Full Name, DOB, DOH, Term Date, Rehire Date, Email, Phone Number, Home Address and more

PAY DATA

Gross comp, Hours, Deferrals, Match, Profit Share, Loans

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OPPORTUNITY

Why

- Marketplace demand
- Free up resources
- Improve operational efficiency

How

- Fast, low cost 360 integration
- Offer a “one to many” solution
- Connect to over 35 record keepers

What

- API integration – no need for payroll company to build files
- SOC Certified, Cloud based, SaaS platform
- Over 4,000 plans



With API 360 integration, you can free up resources to focus on other business

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COST EFFECTIVE SOLUTION

Number of employees	Monthly cost
1 to 25	\$30
26 to 50	\$45
51 to 100	\$60
101 to 499	\$85
500 to 999	\$125
1000+	\$250

Set up in as little as 30 minutes, full 360 integration in 2 to 6 weeks

How we can help you



Virtual meetings



Demo calls



Advisor/TPA presentations

When to use us:

- ✓ HR frustrated with manual processing
- ✓ Leverage technology to improve operational efficiency
- ✓ Save 45 – 100 per year in HR Time
- ✓ API 360 integration with PI partnerships

Contact sales@payrollintegrations.com for more details

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WHO WE PARTNER WITH

Payroll Integrations Partner List

401(k)/403(b) Record keepers	401(k)/403(b) Record keepers	API Payroll Companies
ABGRM	Lincoln Financial Group	RUN Powered by ADP®
Alerus	MVP Administrators	ADP Workforce Now®
American Trust/LT Retire	NestEggs	ADP TotalSource®
APB	OneAmerica (both platforms)	ADP NextGen (Oct. '23)
Ascensus/PAi	PCS Capital	Paychex Flex
BCG	Principal	Paylocity
BEON Retirement	RiversEdge	Quickbooks Online
Betterment	Saturna Capital	iSolved
CUNA Mutual	SpectrumEB	APEX Bureau's listed below
Empower	Spectrum Pension	Optima
EPIC	TRPC	SourceOne
Evolve	Transamerica	CAVU
FinDec	TriAd	Allied Payroll
Human Interest	TSC	CompassOne
Jocelyn Pension	Ubiquity	New England Payroll
JP Morgan Retirement	Verify	Bayview Payroll
July Services	VOYA	HR to Go
		Time & Payroll
		Workplace HCM
In Process		
Ameritas (Q4 2023)		
AmFunds (Q4 2023)		
John Hancock (Sept 2023)		

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